

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT			1. CONTRACT ID CODE		PAGE OF PAGES 1 2		
2. AMENDMENT/MODIFICATION NO. 0001		3. EFFECTIVE DATE 12/17/2004		4. REQUISITION/PURCHASE REQ. NO. S-4-S3-41-41-B00 00		5. PROJECT NO. (If applicable)	
6. ISSUED BY		CODE IRS0088		7. ADMINISTERED BY (If other than Item 6)		CODE	
Internal Revenue Service 6009 Oxon Hill Road, Suite 500 Oxon Hill, MD 20745 SANDY SHIN 202-283-1303/SANDY.SHIN@IRS.GOV				See Item 6			
8. NAME AND ADDRESS OF CONTRACTOR (No. Street, county, State and ZIP: Code) TO ALL OFFERORS				(x)		9A. AMENDMENT OF SOLICITATION NO. TIRNO-05-R-00005	
				X		9B. DATED (<i>SEE ITEM 11</i>) 12/14/2004	
						10A. MODIFICATION OF CONTRACT/ORDER NO.	
						10B. DATED (<i>SEE ITEM 13</i>)	
CODE		FACILITY CODE					

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☒ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☒ is not extended.
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning ___1___ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or
 (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATA SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and data specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

**13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS,
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

(x)	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (<i>Specify authority</i>) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (<i>such as changes in paying office, appropriation date, etc.</i>) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER Specify type of modification and authority)

E. IMPORTANT: Contractor ☐ is not, ☐ is required to sign this document and return ____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (*Organized by UCF section headings, including solicitation/contract subject matter where feasible.*)

Amendment 1 revises, clarifies, and corrects the instructions and evaluation criteria set forth in SECTION IV-- INSTRUCTIONS AND EVALUATION FACTORS of the solicitation. The revised subsections are as follows:

- (1) Subsection 2-- ADDENDUM TO 52.212-1-- INSTRUCTIONS TO OFFERORS -- COMMERCIAL ITEMS;
- (2) Subsection 5--EVALUATION -- COMMERCIAL ITEMS (52.212-2) (JAN 1999); and
- (3) Subsection 6--ADDENDUM TO 52.212-2-- EVALUATION -- COMMERCIAL ITEMS.

The revisions are provided as attachments to this amendment. Revisions are identified by a change bar along the right hand margin of the attached pages.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (<i>Type or print</i>)		16A. NAME AND TITLE OF CONTRACTING OFFICER (<i>Type or print</i>)	
15B. CONTRACTOR/OFFEROR		16B. UNITED STATES OF AMERICA	
15C. DATE SIGNED		16C. DATE SIGNED	
_____ (<i>Signature of person authorized to sign</i>)		BY _____ (<i>Signature of Contracting Officer</i>)	

2. ADDENDUM TO 52.212-1-- INSTRUCTIONS TO OFFERORS -- COMMERCIAL ITEMS

The Offeror shall clearly present information adequate to evaluate fully each of the evaluation criteria at **52.212-2 EVALUATION -- COMMERCIAL ITEMS** of this solicitation. Offerors must propose on the online research package (which includes general and the law enforcement packages). Offeror may also propose on the batch processing package. The Government intends to evaluate the batch processing package separately from the online research package, which could potentially result in two separate contract awards. In the event that the same offeror is found to be most advantageous in all the evaluated areas, the Government will award a single contract for purposes of administrative efficiency.

The proposal shall consist of two separate volumes. Volume I is the Price and Business Proposal. Volume II is the Technical Proposal. The instructions are as follows for each volume:

VOLUME I/PRICE AND BUSINESS PROPOSAL. Volume I shall include the price proposal, representations and certifications, and the subcontracting plan.

A. PRICE PROPOSAL. Offerors are not required to propose on all CLINs. However, to the extent that an offeror chooses to propose on a particular package, i.e. Online Research Package, and Batch Processing Package, the offerors must propose to the full set of CLINS, with the exception of the unlimited access CLIN which is optional. Proposed prices must be (1) fully loaded firm fixed CLIN prices; (1) propose to the full SOW requirement for the package inclusive of all highly desirable features identified in the offerors technical proposal and also training.

The offerors price proposal shall consist of the prices entered into the excel spreadsheet file that is named "Pricing.xls". The first three worksheets identified as *General Package*, *Law Enforcement Package*, and *Batch Processing Package*, are the worksheets in which the individual prices must be entered. These prices will automatically feed into the Pricing Evaluation Models (PEM) and the CLIN prices that will eventually be incorporated into any resulting contract. The quantities used in developing the PEM are reflected in Exhibit D in Section VI of this solicitation. The pricing evaluation models will consist of an evaluated price for the online research (PEM 1) and the batch processing (PEM 2) The total evaluated price for PEM 1 will be the total proposed amount for the general package and the law enforcement package added together. The total evaluated price for PEM 2 will be calculated by adding together the proposed prices for each batch processing representative task.

In entering the data, offerors may not modify any aspect of the spreadsheet other than to: (1) enter prices in the respective cells and (2) to increase the column widths to display values (if necessary).

Offerors are required to submit proposals on a "flat rate" firm fixed price basis for each individual unit CLIN price. Each package identified in the spreadsheet is divided into

separate pricing levels representing different levels of usage for each contract year.

For the General Package and Law Enforcement Package, pricing is broken out by the number of "Concurrent users", which is defined as the total number of employees online or accessing a single locator service simultaneously and also includes an optional line item for unlimited access.

For the Batch Processing Package, pricing is broken out by various potential volume levels. If the IRS requests more Batch Processes than the annually agreed upon maximum for a line item, the cost for these additional searches will be at the rate for the other searches in that price band.

The IRS intends to accept offers only for complete packages - no consideration will be given to offers on items less than any one entire package.

The pricing tables contain an estimate of baseline access volumes and/or concurrent users for the first year and the four subsequent option years. **The baseline usage levels will be used for price evaluation purposes.**

B. SUBCONTRACTING PLAN

(NOTE: Subcontracting plans are not required from offerors that are considered to be small business concerns)

Prepare and submit a small business and small disadvantaged business subcontracting plan, as prescribed in FAR 52.219-9 and outlined in SECTION VI--SUBCONTRACTING PLAN OUTLINE. The subcontracting plan must be accepted by the Government prior to award, and shall be made a part of any resulting contract.

C. REPRESENTATIONS AND CERTIFICATIONS

Offerors shall provide a completed Section V--Representations and Certifications as part of its price and business proposal.

VOLUME II/TECHNICAL AND PAST PERFORMANCE PROPOSAL

Proposal Volume II shall be submitted in accordance with the instructions set forth below. It should be prepared simply and economically, providing a straightforward, concise, delineation of the information provided to satisfy the requirements below.

(a) General.

Each Offeror's Technical Proposal portion of Volume II shall have a maximum number of 75 double-spaced pages that the Technical Evaluation Panel will evaluate (excluding the table of contents and the Section 508 EIT Accessibility Standards Evaluation Spreadsheet that offerors must complete) . Pages beyond the maximum limit will not be

evaluated. In addition, the Volume II pages shall follow the following formats:

(1) All pages shall be one-sided and 21.59 cm by 27.94 cm in size (i.e., 8 x 11 inches). Offerors may substitute fold out pages up to 27.94 cm by 43.18 cm (i.e., 11 x 17 inches). Each fold out page will be counted as two (2) pages. Magazine formatting (two columns per page) is not permissible.

(2) Top/bottom and left/right margins shall be no less than 2.54 cm (i.e., 1 inch).

(3) Each page font shall be no smaller than 12-point with standard proportional fonts (e.g., COURIER) for all text material. Offerors' may use captions no smaller than 6-point fonts; however, captions shall be appropriately used.

(4) Graphics. Each graphic page font shall be no smaller than 6-point.

In order that your technical proposal may be evaluated strictly on the merit of the material submitted, NO CONTRACTUAL COST INFORMATION IS TO BE INCLUDED IN THE TECHNICAL PROPOSAL. THE PROPOSAL SHALL NOT MERELY OFFER TO PERFORM WORK IN ACCORDANCE WITH THE SCOPE OF WORK, BUT SHALL OUTLINE THE ACTUAL WORK PROPOSED AS SPECIFICALLY AS PRACTICAL. The Statement of Work reflects the problems and objective of the program under consideration; therefore, repeating the scope of work without sufficient elaboration will not be acceptable.

(b) Format and Content of Volume II. At a minimum, the technical and past performance proposal volume shall consist of the following sections:

i. Implementation and Operational (I/O) Plan. The Offeror shall submit the synopsis of an I/O plan that describes how it intends to provide access via the Internet; compliance with mandatory requirements including the Section 508, section B 1194.22 and 1194.31 compliance (EIT Accessibility Standards Evaluation Spreadsheet must be completed); the types of databases to be provided; the search methods used to provide data, and how these meet the needs of the public records service as required in the statement of work; and the on-line Help feature of the proposed system that shall include screen facsimiles of the on-line Help features for at least 3 functions.

ii. Training Plan. The Offeror shall submit a Training Plan synopsis that describes its plan to provide training support services to satisfy the requirements of SOW section 6. The synopsis shall describe the management process and the credentials of the personnel to be assigned to facilitate and support the proposed training. The Offeror shall provide copies of any Quick Reference Guides, Instructor Guides and User's Manuals currently in use to assist in training and/or day-to-day operations.

iii. Management Plan. The Offeror shall provide a synopsis that describes its plan to perform/satisfy the requirements stated in the SOW and to demonstrate an understanding of the what controls would be instituted to ensure that required services are provided, how invoices would be processed to ensure that they reflect correct billings, how problems would be dealt with.

iv. Physical/Computer Security Plan. The Physical/Computer Security plan synopsis

shall describe the Offeror's plan to address IRS security issues. The synopsis shall describe the controls of the proposed plan that would prevent unauthorized access to the database and the manner in which physical and computer security requirements will be met (in accordance with the minimum standards set forth in SOW Attachment E.1--PHYSICAL SECURITY REQUIREMENT and SOW Attachment E.2--COMPUTER SECURITY REQUIREMENT).

v. Description of Proposed Highly Desirable System Features. The Offeror shall provide descriptive information on any offered features that address/satisfy the Government's highly desired features set forth in the SOW.

vi. Temporary Account Access. Offerors shall provide eight (8) temporary account numbers and/or passwords. The IRS will access the vendor's product during the proposal evaluation phase to subjectively evaluate system ease of use and for validation purposes.

vii. Relevant Experience and Past Performance. The Offeror shall provide the information indicated in (1) through (7) below for each of its last five (5) agreements/contracts in chronological order by the beginning period-of-performance date for those that are completed or still in progress during the last three (3) years for the same or similar electronic locator/asset services as required in this solicitation.

These agreements/contracts may be between the Offeror and federal, state, or local governments, commercial or non-profit organizations, educational institutions, or other private or public entities.

If the Offeror has less than five (5) such agreements, then so state and include all those completed or still in progress during the three-year period. The representative identified for each client or customer shall be the person who can best address the issues identified in the questions in Exhibit B. Identify an alternate person for each who can also address the issues if the primary person is not available. If the primary person is no longer with the organization, identify both that person and phone number if known and that person's successor or other person who can address the issues. Provide the following information in the technical proposal:

1. name and address of client or customer;
2. name, telephone numbers (both voice and fax if known) and e-mail address (if known) for a primary and alternate person as point-of-contact;
3. period of performance (mm/dd/yyyy - mm/dd/yyyy) and contract;
4. one (1) page description of supplies delivered and/or services performed and whether you provided the supplies/services to the client or customer as a prime contractor or subcontractor; of contract work scope and responsibilities; show how these efforts are similar to this proposed contract effort;

5. total fixed price or estimated price of the agreement/contract, both at date of inception and as a result of any supplemental agreements to the present;
6. discussion of any problems that arose in meeting the customers expectations and how they were resolved.
7. offerors shall forward a copy of Exhibit B to each of its proposed references, along with a stamped envelope which has been pre-addressed to the Contracting Officer. Offerors must give their references instructions to submit their response no later than the proposal due date.

The Government reserves the right to contact some or all of the Offeror's references provided in the Offeror's proposal as examples of experience to discuss and verify the information provided in the Offeror's proposal. The information gathered from these contacts will be used in the evaluation of the Offeror's past performance/experience.

COMPETITIVE RANGE

Following the evaluation of the technical, business, and price proposals, a competitive range determination will be made. Only those offerors within the competitive range will be scheduled for an oral presentation and Operational Capabilities Demonstration (OCD). At the conclusion of each offeror's presentation and OCD, additional clarifications and discussions may occur .

ORAL PRESENTATION & OPERATIONAL CAPABILITIES DEMONSTRATION (OCD)

An oral presentation and operational capability demonstration will be held with all Offerors determined to be in the competitive range. The Oral Presentation and OCD shall be specific and detailed as outlined below, relative to the evaluation criteria set forth in this solicitation. For the oral presentation, it is not desired that the Offeror restate its written proposal. The offeror's oral presentation shall be conducted before the Technical Evaluation Panel (TEP) and authorized procurement personnel. The specific technical criteria that shall be addressed are:

a. Oral Presentation and/or Operational Capabilities Demonstration (OCD)

1. Oral Presentations - Offerors selected to make an oral presentation shall address the technical information below. The evaluation of this information is set forth in 52.212-2. Offerors shall fully and clearly delineate its proposed approach to ensure integration of all aspects of the work, including but not limited to interface with IRS, security arrangements, case processing, computer systems, database management and reports, capacity and effectiveness of data processing and communications.

NOTE: The physical presence and characteristics of the personnel conducting the presentation will not be evaluated - only the informational content and apparent knowledge of the individual(s). Professional assistance in preparing for the oral presentation is not necessary or warranted.

Notice of an offeror's scheduled oral presentation and OCD if required, (date, time and location) will be provided in writing, from the Contracting Officer, within **sixty (60)** business days after the closing date of the RFP.

2. Operational Capabilities Demonstration (OCD) - During the OCD, offerors shall answer questions and demonstrate specific functionalities at the Government's request. To support its technical proposal, the Offeror must provide an OCD of its current computer capabilities and security measures to ensure that the proposed products/services operate in accordance with the Government's specifications and the Offeror's proposal. The purpose of the OCD will be to validate the technical acceptability of proposed features of the electronic research services in accordance with the evaluation criteria set forth in FAR Clause 52.212-2. Offerors shall ensure that the following points are fully and clearly addressed in the presentation:

- Computer capabilities, equipment and operations, and security measures.

Offerors are advised that they should be prepared to perform the OCD for Government verification within seven (7) calendar days after receipt of written notice by the Contracting Officer. The OCD will be conducted at or near the TEP site. The exact site, will be provided when the Offeror is notified of the OCD. The OCD will be a test to validate the functionality and quality of the proposed products/services. Each OCD will last no more than two hours. The Government reserves the right to hold discussions with the Offeror(s) during and/or after the OCD to the extent necessary to obtain a complete understanding of the proposed products/features demonstrated.

Approximately ten (10) Government personnel will participate in the OCD.

b. Schedule for Presentations.

The scheduling of the Offeror's presentations will begin within **sixty (60)** business days after the closing date for receipt of proposals. The presentations will be scheduled as tightly as possible, but the duration of the entire presentation process will be dependent upon the number of offers within the competitive range and the geographic location of those

firms.

To the extent possible, the IRS will attempt to coordinate and accommodate the scheduling needs of each offeror. Once notified of the scheduled date and time for their presentations, offerors shall complete their presentations on the scheduled date and time.

Requests from offerors to reschedule their presentations will not be entertained, and no rescheduling of presentations will be done unless determined necessary by the Government to resolve unanticipated problems or delays encountered in the presentation process.

c. Form of Presentations.

Offerors shall make their oral presentations in person to the TEP. Submission of videotapes or other forms of media containing the presentation for evaluation, in lieu of the oral presentation, will not be authorized. Elaborate presentations are not desired.

d. Offeror's Presentation Team. There may be a maximum of five individuals on each offerors presentation team. The team may consist of the offerors in-house staff or from a critical subcontractor's in-house staff. Offeror's shall submit a written list of the names of the individuals, firms, and position titles of all team members at least 24 hours before the presentation.

e. Documentation. At the close of the presentation, the Offeror shall provide the TEP with a listing of the names, firms, and position titles of all presenters and two copies of any presentation materials, such as slides or view graphs, that have been used in the presentation.

f. Time Allowed for Presentations. Each Offeror will have a maximum of two (2) hours to conduct the oral presentation and OCD. Time for discussions with IRS Technical Evaluation Panel and authorized procurement personnel is not included in this time frame.

At the conclusion of the offeror's oral presentation and OCD, the TEP will present any clarification and/or discussion questions that may develop as a result of the evaluation of the technical proposal, the OCD and/or the oral presentation. If there are no questions, the TEP will inform the Offeror that their individual presentation is concluded.

FINAL REVISED PROPOSAL

After discussions, all offerors still within the competitive range may be requested to submit a Final Revised Proposal. Following the evaluation of the final revised proposal,

the offeror or offerors whose proposals are most advantageous to the Government, considering price and other related factors, will be selected for contract award.

DISCUSSIONS AND CORRESPONDENCE

All communications concerning the solicitation, including any of a technical nature, shall be made through the Contracting Officer. Correspondence, including written questions, should be directed to the address shown in Block 9 of the Standard Form 1449 and marked for the attention of the individual whose name appears in Block 7a of that form. All verbal communications should also be directed to that individual.

Questions concerning any technical aspect of the solicitation shall be in writing. Questions may be submitted in writing via email to Sandy Shin at SANDY.SHIN@IRS.GOV. All questions must be received in writing by no later than December 29, 2004, at 4:00 pm EST.

5. EVALUATION -- COMMERCIAL ITEMS (52.212-2) (JAN 1999)

(a) The Government will award a contract resulting from this solicitation to the responsible offeror or offerors whose offer conforming to the solicitation will be most advantageous to the Government, price and other factors considered. The following factors shall be used to evaluate offers:

(i) technical capability of the services offered to meet the Government requirement;

(ii) relevant experience and past performance; and

(iii) price.

Technical capability is more important than relevant experience and past performance; and relevant experience and past performance is more significant in importance than price. The price evaluation shall include a comparative evaluation of the individual CLIN prices as well as the total evaluated price from the pricing evaluation model.

(b) Options. The price evaluation shall be inclusive of the option prices. The Government may determine that an offer is unacceptable if the option prices are significantly unbalanced. Evaluation of options shall not obligate the Government to exercise the option(s).

(c) A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful offeror within the time for acceptance specified in the offer, shall result in a binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer (or part of an offer), whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award.

(End of Provision)

6. ADDENDUM TO 52.212-2-- EVALUATION -- COMMERCIAL ITEMS

As stated in 52.212-2, entitled *Evaluation --Commercial Item (52.212-2)(JAN 1999)*, the factors that shall be used to evaluate the offers are technical capability, relevant experience and past performance, and price with award being made to the offeror or offerors who provide the best overall value to the Government. This addendum serves to further define both the evaluation process and the evaluation factors and subfactors. The Government intends to evaluate the batch processing separately and independently from the online research package, which could potentially result in two separate contract awards--one contract for the online research package and one for the batch processing. In the event that the same offeror is found to be most advantageous in all the evaluated areas, the Government will award a single contract for purposes of administrative efficiency.

I. The Evaluation Process

The evaluation process will include a preliminary review to determine whether offerors meet the mandatory requirements. If during this preliminary review, an offeror's product and services fail to meet all mandatory requirements identified in the SOW, the Government will deem the offer to be outside the competitive range. The Government will be under no obligation to evaluate any remaining portions of that offeror's technical or price/business proposal. Those whose proposals meet the mandatory requirements will proceed to evaluation phase one structured as follows. Phase one will consist of an evaluation of the written technical and business/price proposals. The competitive range will be determined based on this evaluation. Phase two will consist of the oral presentation, OCD, and other discussions. The initial evaluation shall consist solely of a technical evaluation of the written proposal. The oral presentation and OCD will only be requested and evaluated from those made by offerors within the competitive range. If during the technical evaluation an offeror's product and services fail to meet all mandatory requirements identified in the SOW, the Government will deem the offer to be outside the competitive range. The Government will be under no obligation to evaluate any remaining portions of that offeror's technical or price/business proposal.

Of those who are deemed to have met the mandatory requirements, the Government will proceed in a full evaluation of the technical proposal and the price/business proposal. Those offerors with the most highly rated proposals will be included in the competitive range for further discussions and oral presentations as described on page 6.

Upon completion of discussions and oral presentations, the OCD, and other discussions, the offerors may be afforded an opportunity to revise their offers and submit a best and final offer (BAFO). The Government may incorporate various portions of the winning offeror's proposal into the resulting contract.

II. Evaluation Factors and Subfactors For Online Research

FACTOR 1: TECHNICAL CAPABILITY (86 Points for the Phase 1, Competitive Range Determination; 100 Points for the evaluation in Phase 2)

This factor shall be evaluated to determine whether the offeror's technical approach demonstrates an understanding of the contemplated effort as set forth in the SOW. The major subfactors under technical capability are identified below. It should be noted that in the oral presentations (subfactor 4) will not be requested or evaluated until after the competitive range is determined. Therefore, the maximum number of points for the Phase 1 technical capability factor for online research is 86 points). In Phase 2, an additional 14 points is allocated for subfactor 4, thereby increasing the maximum number of points to 100 for the online research evaluation of the batch processing requirement, subfactors 2 and 3 are not applicable and that subfactor 4 will not be evaluated until after the competitive range has been determined.

SUBFACTOR 1: DEMONSTRATED UNDERSTANDING OF THE SOW (36 Points).

The offerors will be evaluated on their understanding of the requirement and their ability to provide an integrated and credible approach to meeting the requirements. This major subfactor will be primarily evaluated through the synopses of the implementation & operation plan, training, management, and security plans. At a minimum, each plan will be reviewed as follows, however, the Government reserves the right to review all aspects of these synopses as they pertain to this subfactor:

Implementation & Operation (I/O) Plan. The I/O plan will be evaluated to determine:

- a. Whether the offeror meets the mandatory requirements including Section 508 compliance; adequacy of proposed programmatic and business controls; and whether an efficient and credible process is established to identify and successfully resolve problems;
- b. The degree to which the access platform as proposed by each offeror is compatible with the requirements of the IRS;
- c. The degree to which the databases to be provided and the search methods used to provide data meet the needs of the public records service as set forth in the SOW.

Training Plan. The proposed Training Plan synopsis will be evaluated for:

- a. Completeness, capability and capacity in addressing training support service requirements as described in the SOW;

b. Ability to manage the process and provide qualified personnel in supporting the proposed training;

c. Technical clarity and ease of understanding of any Quick Reference Guides, Instructor Guides and User's Manuals currently in use to assist in training and/or day-to-day operations.

Management Plan. The IRS will evaluate the proposed Management Plan synopsis to determine the adequacy of the offeror's organizational structure, policies, procedures, and techniques proposed to manage the work associated with this requirement. The offeror's discussion of both technical and business management will be evaluated for not only thoroughness and reasonableness, but also a demonstrated understanding of the unique circumstances of this contract.

Security Plan. The IRS will evaluate the offerors security plan to determine the degree of compliance with all physical and computer security requirements as set forth in the SOW.

SUBFACTOR 2: HIGHLY DESIRABLE SYSTEM FEATURES (26 Points).

This major subfactor evaluates the degree to which each offeror's proposal incorporates the highly desirable system features as set forth in the SOW.

SUBFACTOR 3: EASE OF USE (14 Points). The Government will subjectively evaluate the overall ease of use of the Offeror's product via on-line access through the temporary accounts each offeror is required to provide.

SUBFACTOR 4: ORAL PRESENTATION (14 Points). This subfactor is only applicable to those offerors within the competitive range. The Government will evaluate this component based on the ability of the offeror to present a fully integrated and credible approach to fulfilling the requirements of the RFP, including but not limited to interfacing with the IRS, security arrangements, case processing, computer systems, database management and reports, capacity and effectiveness of data processing, and communications.

SUBFACTOR 5: PERFORMANCE RISK (10 Points). The Government will evaluate performance risk reflected in the offerors technical and business proposals. The evaluation of performance risk includes, but is not limited to business, schedule, resources, and expertise. The Government will evaluate the scope, soundness and completeness with which the offeror identifies, manages, and mitigates risk and also the Offeror's experience with similar risk areas and lessons learned that are relevant as they pertain to the online research services Asset Locator services.

FACTOR 2: RELEVANT EXPERIENCE AND PAST PERFORMANCE

This evaluation factor will be used to evaluate how each offeror has performed on previous efforts that have been similar in scope, complexity, and contract type. This evaluation serves as a measure of the credibility of the offeror's proposal and relative capability to meet performance requirements. This factor will be rated on a scale of 0 to 5, where 0 represents unacceptable relevant experience and past performance and a 5 designates superior relevant experience and past performance. In the event that an offeror has no relevant experience or past performance data to evaluate, the offeror will be rated neither favorably nor unfavorably. It will be identified as "N/A" for not applicable. Offerors should note that this evaluation factor will not be point scored in the manner specified for Factor 1 where the subfactor scores are added together to derive an overall numerical score. However, relevant experience and past performance will be considered in the establishment of the competitive range and may be used in any tradeoff determination.

Information obtained from the offeror will be used by the Government in conducting the past performance evaluation. Information obtained from other sources that may have useful information may also be used by the Government in conducting this evaluation. Of the five (5) references submitted by the Offeror, the Government will contact three (3). The Government will provide an opportunity for clarification when poor past performance evaluations are received.

This evaluation will concern an offeror's past performance based on prior experience as a supplier of electronic asset/locator service(s). It will not concern the prior experience of individual personnel in the offeror's organization or of any proposed subcontractors.

The offeror is responsible for ensuring that correct information is provided for each case, especially for each point-of-contact person.

In the event that an offeror has no relevant experience or past performance data to evaluate, the offeror will be rated neither favorably nor unfavorably. A neutral rating will be assigned.

FACTOR 3: PRICE

The proposed price will be evaluated using price analysis in accordance with FAR 15.404-1(b). The price for the online research and the batch processing will be evaluated separately. However, an offeror may not propose on the batch

processing unless it has also proposed on the online research package. The first PEM will be for the online research. It will consist of the total combined price for the general package and the law enforcement package for the base and option years.

The second PEM will consist of the total evaluated price for the batch processing will be the total combined price for the five representative tasks for the base and option years.

In addition to the evaluation of the two PEMs, the Government will also review the individual CLIN/Sub-CLIN prices to determine whether the unit prices are reasonable and balanced. The Government reserves the right to reject an offer that contains unbalanced pricing pursuant to FAR 15.404-1(h).

III. Evaluation Factors and Subfactors For Batch Processing. To the extent that an offeror chooses to bid on the batch processing requirement, the following evaluation criteria will be applied. As indicated earlier, an offeror that chooses to propose on the batch processing is also required to propose on the online research effort.

FACTOR 1: TECHNICAL CAPABILITY (46 Points for the Phase 1, Competitive Range Determination; 60 Points for the evaluation in Phase 2)

For the evaluation of the batch processing requirement, technical capability will be similar to factor 1 identified for the online research effort in that it shall be evaluated to determine whether the offeror's technical approach demonstrates an understanding of the contemplated effort as set forth in the SOW and representative tasks. However, for the batch processing evaluation in Phase 1, the subfactors 2 and 3 identified for the online research requirement are not applicable and subfactor 4 will only be evaluated in Phase 2. Subfactor 4 is the oral presentation and like the online research, the batch processing requirement will only request and evaluate oral presentations from those offerors considered to be in the competitive range

Therefore, only subfactors 1 and 5 will be evaluated for Phase 1. The maximum number of points for the Phase 1 technical capability factor is 46 points). In Phase 2, an additional 14 points is allocated for subfactor 4, thereby increasing the maximum number of points to 60.

SUBFACTOR 1: DEMONSTRATED UNDERSTANDING OF THE SOW (36 Points).

The offerors will be evaluated on their understanding of the requirement and their ability to provide an integrated and credible approach to meeting the requirements. This major subfactor will be primarily evaluated through the synopses of the implementation & operation plan, training, management, and security plans. At a minimum, each plan will be reviewed as follows, however, the Government reserves the right to review all aspects of these synopses as they pertain to this subfactor:

Implementation & Operation (I/O) Plan. The I/O plan will be evaluated to determine:

- a. Whether the offeror meets the mandatory requirements including Section 508 compliance; adequacy of proposed programmatic and business controls; and whether an efficient and credible process is established to identify and successfully resolve problems;
- b. The degree to which the access platform as proposed by each offeror is compatible with the requirements of the IRS;
- c. The degree to which the databases to be provided and the search methods used to provide data meet the needs of the public records service as set forth in the SOW.

Training Plan. The proposed Training Plan synopsis will be evaluated for:

- a. Completeness, capability and capacity in addressing training support service requirements as described in the SOW;
- b. Ability to manage the process and provide qualified personnel in supporting the proposed training;
- c. Technical clarity and ease of understanding of any Quick Reference Guides, Instructor Guides and User's Manuals currently in use to assist in training and/or day-to-day operations.

Management Plan. The IRS will evaluate the proposed Management Plan synopsis to determine the adequacy of the offeror's organizational structure, policies, procedures, and techniques proposed to manage the work associated with this requirement. The offeror's discussion of both technical and business management will be evaluated for not only thoroughness and reasonableness, but also a demonstrated understanding of the unique circumstances of this contract.

Security Plan. The IRS will evaluate the offerors security plan to determine the degree of compliance with all physical and computer security requirements as set forth in the SOW.

SUBFACTOR 2: HIGHLY DESIRABLE SYSTEM FEATURES **NOT APPLICABLE TO BATCH PROCESSING**

SUBFACTOR 3: EASE OF USE **NOT APPLICABLE TO BATCH PROCESSING**

SUBFACTOR 4: ORAL PRESENTATION (14 Points). This subfactor is only applicable to those offerors within the competitive range. Oral presentations will only be requested and evaluated in phase 2 of the evaluation process. This subfactor will be evaluated to determine the ability of the offeror to present a fully integrated and credible approach to fulfilling the requirements of the RFP, including but not limited to interfacing with the IRS, security arrangements, case processing, computer systems, database management and reports, capacity and effectiveness of data processing, and communications.

SUBFACTOR 5: PERFORMANCE RISK (10 Points). The Government will evaluate performance risk reflected in the offerors technical and business proposals. The evaluation of performance risk includes, but is not limited to business, schedule, resources, and expertise. The Government will evaluate the scope, soundness and completeness with which the offeror identifies, manages, and mitigates risk and also the Offeror's experience with similar risk areas and lessons learned that are relevant as they pertain to batch processing.

FACTOR 2: RELEVANT EXPERIENCE AND PAST PERFORMANCE

This evaluation factor will be used to evaluate how each offeror has performed on previous efforts that have been similar in scope, complexity, and contract type. This evaluation serves as a measure of the credibility of the offeror's proposal and relative capability to meet performance requirements. This factor will be rated on a scale of 0 to 5, where 0 represents unacceptable relevant experience and past performance and a 5 designates superior relevant experience and past performance. In the event that an offeror has no relevant experience or past performance data to evaluate, the offeror will be rated neither favorably nor unfavorably. It will be identified as "N/A" for not applicable. Offerors should note that this evaluation factor will not be point scored in the manner specified for Factor 1 where the subfactor scores are added together to derive an overall numerical score. Relevant experience and past performance will be considered in the establishment of the competitive range and may be used in any tradeoff determination.

Information obtained from the offeror will be used by the Government in conducting the past performance evaluation. Information obtained from other sources that may have useful information may also be used by the Government in conducting this evaluation. Of the five (5) references submitted by the Offeror, the Government will contact three (3). The Government will provide an opportunity for clarification when poor past performance evaluations are received.

This evaluation will concern an offeror's past performance based on prior

experience as a supplier of electronic asset/locator service(s). It will not concern the prior experience of individual personnel in the offeror's organization or of any proposed subcontractors.

The offeror is responsible for ensuring that correct information is provided for each case, especially for each point-of-contact person.

FACTOR 3: PRICE

The proposed price will be evaluated using price analysis in accordance with FAR 15.404-1(b). The price for the online research and the batch processing will be evaluated separately. However, an offeror may not propose on the batch processing unless it has also proposed on the online research package. The second PEM will consist of the total evaluated price for the batch processing. It will be the total combined price for the five representative tasks for the base and option years.

In addition to the evaluation of the PEM price, the Government will also review the individual CLIN/Sub-CLIN prices to determine whether the unit prices are reasonable and balanced. The Government reserves the right to reject an offer that contains unbalanced pricing pursuant to FAR 15.404-1(h).